



**STATE OF MONTANA  
SECRETARY OF STATE'S OFFICE  
JOB PROFILE AND EVALUATION**

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**SECTION I - Identification**

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**Working Title:**

Records Management Technician

**Department:**

Secretary of State

**Class Code Number:**

436413

**Division/ Bureau:**

Records and Information Management

**Class Code Title:**

Secretary

**Section/ Unit:****Pay Band:**

3

**Work Address:**1320 Bozeman  
Helena, MT 59601**Position Number:**

66029

**Phone:**

406-444-9000

☐ FLSA Exempt☒ FLSA Non-Exempt**Profile Completed By:**

Patti Borsberry, Deputy

**Work Phone:**

406-444-9000

**Work Unit Mission Statement or Functional Description:**

The Secretary of State (SOS) is one of six executive branch officers originally designated by the Montana Constitution of 1889. The duties of the secretary of state include: interpreting state election laws and overseeing elections; maintaining the official records of the executive branch and the acts of the legislature; reviewing, maintaining, and distributing public-interest records of businesses and nonprofit organizations; filing, publishing, and maintaining administrative rules adopted by state departments, boards and agencies; attesting to the governor's signature on executive orders, proclamations, resolutions, extradition papers, and appointments; preserving the state seal; filing and maintaining records of secured financial transactions, such as liens; serving on the state Board of Land Commissioners and the Board of Examiners; and commissioning notaries public. The Secretary of State's Office is divided into four working units: Elections, Business Services, Administrative Rules/Notary, and Records and Information Management (RIM).

The Records and Information Management (RIM) administers and provides the statutory stewardship for enterprise records and information management (RIM) governing statute & policy, State Records Center operations, Document Conversion services (imaging/microfilming); serves as a training resource to state and local agencies, provides standards and guidelines essential to continuity and accountability in government.

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***Describe the Job's Overall Purpose:***

Ensures the State of Montana's records and information management (RIM) statutes, administrative rules and agency procedures are applied and followed, internally and externally, when meeting requirements or needing the services of the state provided Records Center's and Document Conversion's sections. Ensures the records management application and accounting applications are administered and utilized to their full application capabilities and that the billing for services rendered follows the fees-commensurate-to-costs schedule. This position demonstrates the need for attention to detail and multi-tasking. Responsible for database maintenance, up to date, complete and accurate records, providing excellent customer service; collect, store, retrieve and disseminate information. Internal records and files management and supply ordering. Researches and recommends new ideas and business solutions for cost effectiveness and increased efficiencies. This position works independently under the supervision of the deputy and work assignments are overseen by the Program Specialist (66507). This position does not supervise any other personnel.

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***SECTION II - Major Duties or Responsibilities***

**A. This position ensures state records and information management requirements are administered, and adhered to, as relating to the accessibility, integrity and security of state agencies' public records. 60%**

1. Provides support to Montana branch agencies, plus local governments, in all areas of the records and information management services offered by the SOS-RIM. This includes areas of document lifecycle, record value, records retention, storage management, micrographics, document imaging, access management, off-site storage and disaster recovery.
2. Manages the intake and final workflow processes (see Duty B), for all service-related work orders received (approx 350/month) in the areas of digital imaging, microfilming, retention application, records repository, historical society transfer, and other office administration; servicing over 400 customer accounts who utilize these state-provided RIM services. Intake workflow can be initiated by phone, email, fax or customer walk-in.
3. Responsible for the accurate data production and the use of software utilities, within a Records Management Application (RMA); associated with an estimated 40,000 box inventory; barcode labeling and tracking, access/security management, retention application, records check-in/out, disposal or transfer and all reporting associated to these functions.
4. Administratively supports the deputy, records center supervisor, document conversion supervisor and records specialist, ensuring integrity of internal and external, hardcopy and electronic document and micrographic handling.
5. Promotes and provides excellent internal and external customer relations and services, enabling cost-savings and business efficiency in the areas of records management, preservation and proper disposition.
6. Responsible to meet internal workflow, as outlined in procedures and performance plans, maintaining high-quality output and high-standard, accurate production.

**B. Administers the accounts receivable applications, recovering costs commensurate with Records Center and Document Conversion services. 30%**

1. Manages two billing systems using knowledge of accounting software and the Statewide Accounting, Budget and Human Resource System (SABHRS). Utilizes web-based and desktop applications for billing entry detail, edit, reconciliation and reporting utilities for capturing revenues from state agencies. Local government payments transacted by hard copy checks, following the agency's daily cashing and depositing process.
2. Monitors the billable fees codes and production accountability, creation and electronic distribution of monthly invoices and statements based on billing summary worksheets, records center requests, document conversion services, item inventory and analysis; utilizing internal forms, procedures and workflow processes from each section.
3. Ensures billable costs and payment intake are accurate and applied, keeping customer accounts correct and current. Attention to detail utilized for multiple receiving processes, ensuring monthly and fiscal year-end balancing, reconciliation and reporting methods, account maintenance, overdue notifications and custom detail summaries.
4. Responsible to manage customer accounts and history, billing inquiries, collection of applicable fees, accounting timelines, audit participation and problem or error resolution.

**C. Other Duties 10%**

This position performs a variety of other duties as assigned by the supervisor in support of the agency mission and work unit objectives. This includes fostering and promoting good client relationships, exchanging information with internal and external agency staff and the public; providing professional and technical assistance; internal records and forms management and other special projects as assigned; participates in ongoing training and educational opportunities.

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**2. *Specific examples of problems solved, decisions made, or procedures followed when performing the most frequent duties of this position include:***

Assessing many diverse customer needs, determining appropriate actions and compliance requirements for state agencies addressing records management, retention, access, preservation and disposition; as specific to their functions and the value of the records generated or received, when performing those functions.

**3. *The most complicated aspect of this position is:***

Constant multi-tasking and maintaining accuracy when handling large volumes of diverse customers, requests and needs.

Attention to detail is imperative for accountability and reliability. The attention to detail, required, to manage the monthly receivables detail and accountability between applications, monthly and fiscal year end (FYE) balancing and adherence to state and agency-specific fiscal procedures for all accounts receivable functions.

Internal compliance to ensure proper operational and procedural requirements are followed.

4. **Guidelines, manuals, or written procedures that support this position include:**  
MCA Title 2, Records Management Policies and Procedures Manual, ARM Title 44, SIMPLE Records Manager Manual, SABHRS MINE and Quickbooks Application Manual.

5. **Which of the duties and/or specific tasks listed under 1 (above) are considered “essential functions” that must be performed by this position (with or without accommodations)?**

The following duties are considered essential functions because they require specialized expertise and skill and are the primary reasons the job exists:

Duty A:

This position ensures state records and information management requirements are administered and adhered to, as relating to the accessibility, integrity and security of state agencies' public records.

Duty B:

**Administers the division's accounts receivable application, recovering costs commensurate with Records Center and Document Conversion services.**

The following mental and physical demands are associated with these essential functions:

#### **PHYSICAL**

- Lifting (up to 30 lbs.)
- Remaining seated for extended periods of time, with occasional walking; standing; bending
- Standing on records center ladder to retrieve boxes from high shelving
- Travel within the state to project locations, and out of state travel by airline to national conferences and meetings.
- Operating a personal computer
- Communicate in writing, in person, and over the phone

#### **MENTAL**

- Deal with the public on a regular basis
- Ability to multi-task
- Demands for accuracy in all aspects of work
- Ability to meet inflexible deadlines
- Computing arithmetic operations
- Comparing data
- Compiling information
- Analyzing, Synthesizing
- Coordinating
- Negotiating
- Instructing

6. **Does this position supervise others?** ☐ Yes ☒ No

**Number directly supervised:**

**Complexity level of the positions supervised:**

**Position Number(s) of those supervised:**

**7. This position is responsible for:**

- |   |                                     |                                      |                                    |
|---|-------------------------------------|--------------------------------------|------------------------------------|
| <input type="checkbox"/> Hiring                 | <input type="checkbox"/> Firing     | <input type="checkbox"/> Supervision | <input type="checkbox"/> Pay Level |
| <input type="checkbox"/> Performance Management | <input type="checkbox"/> Promotions | <input type="checkbox"/> Discipline  |                                    |
| <input type="checkbox"/> Other:                 |                                     |                                      |                                    |

**8. Attach an Organizational Chart.**

ATTACHED

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**SECTION III - Minimum Qualifications - List minimum requirements for the first day of work.**


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**Critical knowledge and skills required for this position:****KNOWLEDGE:**

This position requires considerable knowledge of records and information management standards, procedures and practices, accounts receivables processes, database application, time management and the state accounting, budgeting and human resource system (SABHRS), customer service experience and strong communication abilities.

**SKILLS:**

This position requires skills in the compilation, analysis, coordination, negotiation and instruction in the areas of:

database management

accounts receivable management

excellent writing and oral communication

accuracy and attention to detail in all aspects of work

multi-task capabilities

efficiently operates a personal computer using Microsoft Office products or the state's equivalent standard software

lifting up to 30 pounds

travel, when required.

**Behaviors required to perform these duties?**

- **Verbal Communication:** Keeps appropriate individuals informed. Listens to others respectfully, understands or seeks clarification, and responds appropriately demonstrating tact and diplomacy. Expresses thoughts and ideas clearly.
- **Written Communication:** Writes clearly, logically and effectively using proper style, tone, grammar, spelling and punctuation.
- **Flexible at Work:** Responds positively to changes in direction, priorities, responsibilities, personnel or assignments. Works effectively in a variety of situations and with a variety of individuals or groups.
- **Working with Others:** Relates to others in an open and accepting manner; is approachable. Offers and accepts opinions constructively. Adjusts to how individuals and the work unit will react. Treats others with respect. Constructively resolves disagreements. Is open to others' ideas and gives credit and recognition to others.

- **Responsive to Work Needs:** Willing to perform different jobs, cross train, or assist wherever needed. Is aware of co-worker workload and responds accordingly.
- **Takes Action:** Takes effective and appropriate action to perform job duties without being reminded. Willingly accepts more responsibility or more work.
- **Forward Looking:** Suggests improvements and new ideas, technologies, and approaches. Willingly applies new and evolving ideas, methods, designs and technologies to work.
- **Efficiency and Focus:** Uses time effectively and prioritizes tasks. Is aware of workload and makes appropriate adjustments to meet deadlines and complete tasks. Handles interruptions or distractions and stays on task. Achieves goals.
- **Accuracy:** Ensures accuracy of work and makes corrections in a timely manner. Is conscientious and monitors own quality of work.
- **Attendance:** Arrives on time for work and demonstrates good attendance record.
- **Organizational Awareness:** Understands and follows the rules, policies and laws that govern work. Identifies key decision-makers; understands and respects the balance of authority. Acts in an ethical manner.

#### **Education:**

Check the one box indicating minimum education requirements for this position for a new employee the first day of work:

- |   |  |
|---|--|
| <input type="checkbox"/> No education required                              | <input type="checkbox"/> Related AAS/2-years college/vocational training |
| <input type="checkbox"/> High school diploma or equivalent                  | <input type="checkbox"/> Related Bachelor's Degree                       |
| XX <input checked="" type="checkbox"/> 1-year related college/voc. training | <input type="checkbox"/> Related Master's degree                         |

#### **Please specify the acceptable and related fields of study:**

*Office administration, accounting and records and information management.*

#### **Required/Acceptable:**

Office Administration, Records and Information Management, Business Administration

#### **Related:**

#### **Other education, training, certification, or licensing required (specify):**

#### **Experience:**

Check the one box indicating minimum work-related experience requirements for this position for a new employee the first day of work:

- |   |  |
|---|--|
| <input type="checkbox"/> No prior experience required | <input type="checkbox"/> 3 to 4 years    |
| X <input checked="" type="checkbox"/> 1 to 2 years    | <input type="checkbox"/> 5 or more years |

#### **Other specific experience (optional):**

**Alternative Qualifications:**

This agency will accept alternative methods of obtaining necessary qualifications.

X Yes ☐ No

***Alternative qualifications include:***

One year of SABHRS accounting experience or office management can be substituted for one year post-secondary education.

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***SECTION IV – Other Important Job Information***

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Work is performed in a normal office environment, and the position requires the ability to communicate effectively in person, in writing, and over the phone. Work hours vary in complying with numerous deadlines, customer requests, interruptions and wide fluctuations in work volumes, and deadlines require the employee to be able to work under pressure for long periods of time.

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**SECTION V – Signatures**

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My signature below (typed or hand written) indicates the statements in Section I to IV are accurate and complete.

**Employee:**

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Immediate Supervisor:**

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Deputy:**

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Department Designee:**

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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**STATE OF MONTANA  
SECRETARY OF STATE'S OFFICE  
JOB EVALUATION**

**This section is to be completed by a trained classifier in or contracted by the agency or by the State Personnel Division.**

Prepared By: \_\_\_\_\_ Date: \_\_\_\_\_

Position Status: ☐ Reclassified ☐ Vacant ☐ New Position ☐ Career Ladder

Choice of Class Series:

*Position Summary:*

Classification Factor Level:

The predominant work of this position consists of:

Factor level Comparison:

Benchmark Comparisons:

***Classification Analyst:***

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

***Deputy Approval:***

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

***Agency Approval (Chief Deputy):***

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Upon completion of this section the classifier should make certain that the Job Code Number, Job Code Title and Pay Band on the first page of this document accurately reflect the Choice of Class Series and classification factor level determined above. Attach Organizational Chart, Audit Notes or other pertinent information.

This completed document should now be filed in: I:\Classref\Agencyjp\agency#\filename).  
File naming convention is: (position#)jp(date).doc (e.g. 000573jp0100.doc, where date is: month year).